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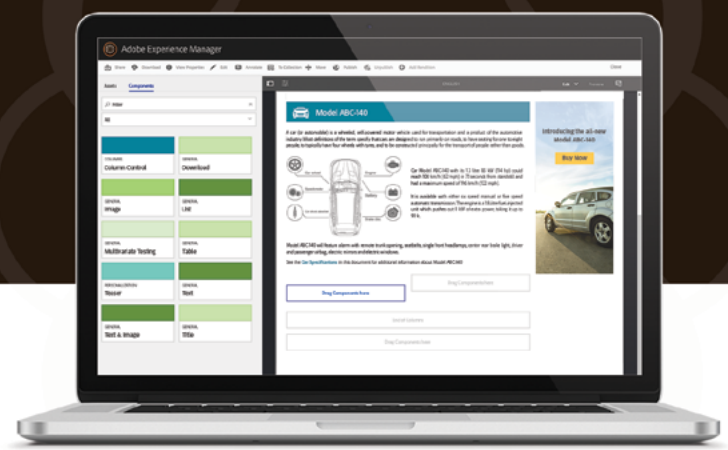

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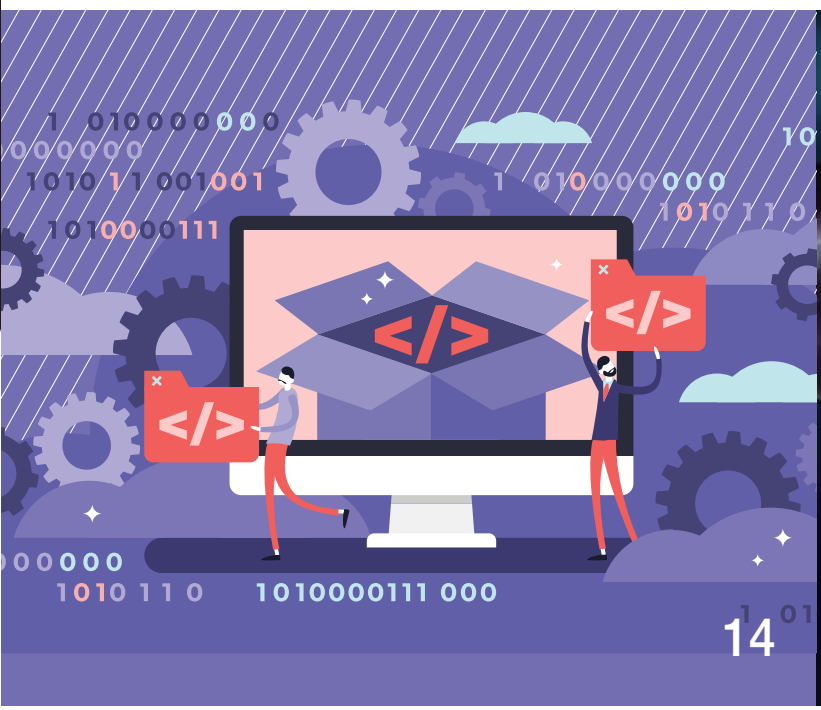

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Address Changes: membership@stc.org
Intercom Editorial: intercom@stc.org

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Intercom (ISSN 0164-6206) is published 8 times a year (monthly, except for February, April, June, and August) by the Society for Technical Communication, 3251 Old Lee Highway, Suite 406, Fairfax, VA 22030, a nonprofit educational organization, as a service to its membership. Membership in STC includes an online subscription to **Intercom**. Periodicals postage paid at Fairfax, VA, and additional offices.
Postmaster Send address changes to **Intercom**, Attn: Membership, c/o Society for Technical Communication, 3251 Old Lee Highway, Suite 406, Fairfax, VA 22030.

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A Note from the Editor

CONTENT QUALITY is an issue that affects all of us—from content strategists, architects, and engineers to technical editors and writers. We all have a role to play, and such an important *Intercom* topic cried out for someone with very special qualifications to curate the content to guide us.

Yoel Strimling is that someone. Yoel has been an editor for 20 years, and he currently works as the Senior Technical Editor/Documentation Quality SME for CEVA Inc. in Herzelia Pituach, Israel. Passionate in his pursuit of content quality, he has conducted important research about determining the characteristics of documentation quality from the reader's point of view, which has been published in both *Technical Communication* and *Intercom*. He is the editor of *Corrigo*, the official publication of the STC Technical Editing SIG, and now he is also the guest editor of this issue of *Intercom* covering content quality.

Yoel has assembled an eclectic group of known and new voices for the issue, providing many perspectives of what content quality is and how to achieve it. My thanks to Yoel for this excellent collection of articles and to Steven Jong, Lisa Gay, Ben Mansheim, Rochelle Fisher, Enid Newberg, Fran Sardone, Lara Kulpa, and Peter Johnson for contributing their thoughts and their time to enlighten us on this important topic!

In this issue, you'll also find an excellent selection of columns from some of our regular columnists.

- Given this issue's theme, it's no surprise that Michelle Corbin coordinated with Yoel on her "Editing Matters" column, in which she discusses how technical editing, at its heart, is a quality assurance process.
- Amanda Krauss is Russell Willerton's guest columnist this month for his "Ethics" column, and she provides us with some recommendations for approaching the problem of ethics in usability and privacy.
- In "Convergence Conversations," Alan Porter describes a Twitter conversation he had with his followers about content quality.
- In "Health and Medical Communication," Kirk St.Amant discusses how we can address three critical factors when designing content for health-related processes.

As always, don't forget to check out the Society Pages to keep up with what's going on around STC!

Interested in learning more about content quality? Want to give us *your* definition of content quality? We'd love to hear it! Catch us online at *https://www.stc.org/intercom/*. Just click on an article's title to view it, scroll to the bottom of the page, and comment! We'd love to hear from you! You can also contact me, Yoel, or any of the authors or columnists using the contact information in their article bios. We look forward to having a conversation with you!

Until next year!

Andrea Ames

— Andrea L. Ames
andrea@idyllpoint.com

A Note from the Guest Editor

WHEN ANDREA APPROACHED me to guest edit this special issue of *Intercom* on "Content Quality," I was, of course, honored. Having worked as a technical editor for over 20 years, and being deeply involved in documentation quality research, the goal of providing readers with high-quality content is my bread and butter.

But then I began to panic a little bit. Where to begin with such a formidable topic? "Quality" is a very elusive concept. As Robert Pirsig says in *Zen and the Art of Motorcycle Maintenance*, "You know what it is, yet you don't know what it is." How can we even begin to have a discussion about content quality if we can't define it?

Quality is, at its heart, a concept that cannot be fully defined; after all, what quality *is* depends solely on the observer. So I thought, "Every article I receive is going to define content quality in a different way, and Andrea certainly won't let me have an unlimited number of articles! I need to find some way to limit the scope of the definitions without limiting the usability of the articles."

So I asked prospective authors to look at this complicated idea of "content quality" and tell me how they see it, how they think their audiences see it, how they ensure the two approaches match, and what they themselves have done to improve the quality of the content they send to their audiences. Most importantly, I wanted the articles in this special issue to give *Intercom* readers food for thought that they could use to think more about what "content quality" means to *them* and how they could apply it to their *own work*.

In addition, when soliciting articles for this special issue, I made a conscious decision to try to include people outside of the regular STC circles, not because I thought STC members would have nothing to add, but because I felt that such an amorphous idea like "content quality" would benefit from the broadest possible scope of contributors. This led to an amazing number of submissions and helped me find articles that I felt had the highest levels of applicability.

Steven Jong starts us off on our journey to understanding content quality by proposing a potential framework built on three groups of stakeholders: customers, clients, and (technical) communicators. He suggests that we can use this framework to understand what each group expects from the content and then balance the needs of all of them to produce high-quality content.

Lisa Gay looks at applying user experience (UX) design principles based on usability testing practices. She discovered that, even though she thought she knew her audience well when she started writing, testing the usability of her documents opened her eyes to a whole new level of understanding what her readers really wanted. Based on her experiences, she gives us some practical pointers for testing the usability of our own content—even with limited time and resources.

Continuing with personal experiences of improving content quality, Ben Mansheim relates a true story about a nightmare project—hundreds of pages of poorly written documents that needed to be reviewed for technical accuracy and writing style and then approved by multiple SMEs and technical communicators—that he was able to turn into a dream scenario by using open source documentation principles. He and his team stored the content source files in a GitHub repository and used commits and pull requests to write, comment, review, and approve all of the content in an efficient manner—and most importantly, to improve the quality of the content without killing themselves in the process.

Rochelle Fisher also draws on her personal experiences to explain how she feels quality definitions have changed over the past 20 years. She believes that high-quality content in the modern age has to be relevant, controlled, and accurate, and she gives us clear and concrete examples of what she means by each of these. She also warns us that these are the ideal definitions of quality; we must also be aware of another definition of quality: reality. We should apply these ideal definitions of quality when and where we can, but sometimes we have to be okay with what we can get in the time that we have.

While all of these articles provide us with great ideas about how to improve the quality of our content, we can't have a conversation about content quality without finding out what our readers themselves think. Too often, content creators (in our case, technical communicators) are disconnected from their audiences and miss the voice of their content consumers. We sometimes write our documentation in a vacuum, hoping that what we are creating is what our readers actually want.

To address this situation, I invited four content consumers to discuss how they define "content quality," give some real-life examples of their own experiences with both good and bad content, and offer us some advice about how to give them the high-quality content that they are looking for. Enid Newberg, Fran Sardone, Lara Kulpa, and Peter Johnson share their thoughts with us. It's a rare chance to listen to what our audience is saying!

I hope you find the articles in this special issue of *Intercom* entertaining, as well as useful and applicable, and that they meet your own personal definition of quality.

— Yoel Strimling
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A Framework for Thinking about Documentation Quality

By STEVEN JONG | *STC Fellow*

OUR INTEREST IN DOCUMENTATION QUALITY isn't new, and through the years, the questions have been the same: what is documentation quality? How do we measure it? And most importantly, how do we achieve it?

U.S. Supreme Court Justice Potter Stewart famously refused to offer a legal definition of pornography, saying only, "I know it when I see it." The concept of quality seems equally elusive. The literature is full of different (and sometimes contradictory) definitions, and some have even declared that a universal definition of quality is impossible.

What's the problem? We recognize quality all around us. We desire it in our products and services as consumers, and most people consider higher quality something worth paying extra for. But when we are asked (usually by an engineering manager) what quality means in our own field, and particularly when we are asked to meet a specific quality standard, we reflexively balk and claim that writing is art and an ineffable mixture of taste and style.

Attributes of Quality

In search of documentation quality attributes, our instinct has always been to ask our customers what quality means to them. Over the years, practitioners and academics have administered numerous surveys. This is good and necessary work, because products and modes of communication change over time. Each attempt to define or apply documentation quality, and each new survey, yields a fresh set of attributes. Yet each survey is only a snapshot in time of a limited set of customers about a limited set of products from a limited set of vendors. We would like to combine the results, but survey methodologies, and the questions asked in each one, change over time as well.

With enough answers, could we determine exactly what attributes bring quality? The problem is establishing which attributes *cause* quality and which are just *associated* with quality. Consider this attribute: "Every statement in the document should be necessary and correct." It's safe to say that correctness causes good quality, while incorrectness causes poor quality. Now, consider this one: "Timestamps in examples should match the product release date." This attribute is associated with good quality, but it's not causal. Examples can have old timestamps and still be correct. But they raise doubts in the reader's mind, because outdated examples tend to be inaccurate. At one time, a popular

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working definition of documentation quality centered on four key attributes: correct, complete, clear, and concise. This definition sounds good; it's hard to argue that an incorrect, unclear, or prolix work is of high quality. However, completeness hasn't aged as well, because the principle of minimalism suggests it's not actually desirable. Another once-popular attribute, index thoroughness, has fallen into disuse, because users today overwhelmingly prefer search engines to indexes. Meanwhile, accessibility has become important. All quality attributes are subject to similar interpretation and evolution.

Also, quality consists of both things present and things absent: the presence of positive attributes (though some are implicit) that customers ask for, and the absence of negative attributes, which customers won't mention but don't want. Just the other day, I ordered a takeout salad that arrived with a beetle crawling through it. Previously I would not have defined quality in salads as "having no bugs"—I've never ordered a salad "hold the bugs"—and maybe someday people will regard them not as bugs but as features. For now, I'll at least make it a point of inspection.

We shouldn't just discard potential attributes; they all reflect some underlying truth. Instead, I think we should categorize them (grouping attributes into categories that one hopes remain stable over time), and then determine which ones are most important. To make sense of them all, we need a framework to think about quality, one into which every quality attribute and category can fit.

Stakeholders in Quality

I think the best way to classify quality attributes is to consider the perspective of stakeholders, a business concept familiar to most of us. Who cares if the work we do is of high quality? Our customers, obviously, but it's more than just them. Technical communicators exist in the realm of work for hire intended for an audience. The full set of stakeholders are *customers* (our audience), *clients* (those who hire us), and *communicators* (we ourselves). Each stakeholder has a different perspective on documentation quality, and all of the perspectives are valid (if perhaps not equal).

Customers

Most quality attributes are customer facing. Customers say they want clear and accurate information. Some companies define "quality" wholly as customer satisfaction, and many academic and practitioner surveys focus on what users think of information products. You'll find plenty of examples, so I won't try to add to this expanding body of knowledge, but customer quality attributes are typically grouped into these categories:

- **Audience:** The document is appropriate for the intended audience.
- **Writing:** The information is correct and clear.
- **Editing:** There are no spelling or grammatical errors.
- **Illustration:** Diagrams are crisp and clear, and screenshots are useful and legible.
- **Organization:** Topics are logically grouped.
- **Navigation:** It's easy to find and get to information.
- **Production:** Physical documents are well printed and bound; online documents are well laid out on all display devices.

Clients

Customer-facing attributes are well known, but few of them touch on the needs of clients. What do clients want? Geoffrey Bessin offers a novel approach: "Quality is 1) a well-defined process for 2) creating a useful product that 3) adds value for both the consumer and the manufacturer" (2004). Client quality attributes are almost entirely different from what customers look for. The motto of a discount chain that once did business in my area was "good stuff, cheap"; that's it in a nutshell. Every business wants the best product it can make for the lowest cost of production. The fundamental job description at my first employer was to produce "timely and accurate" documentation. Yes, accuracy was a shared attribute, but timeliness—documents ready on schedule to support a release—came first. A quality production process is timely, productive, efficient, repeatable, and predictable.

Years ago, I watched two colleagues document an email product with two user interfaces. A veteran writer was assigned to write the command-line interface manual, while a junior writer was tasked with writing the forms-based interface manual. Development was ongoing and some functions were volatile. The newbie energetically tackled the changing functions first. She met daily with developers, tracked every change closely, and regularly sent out drafts to review. Meanwhile, the veteran worked steadily, starting with the stable functions and leaving the unstable ones until they settled down near the end. When the drafts came due, the veteran was done, but the newbie had finished just the one chapter. To save the release, the rest of us had to pitch in. We got it done, but only after nights and weekends of heroic work. Judging from their reception, the resulting books were equally accurate and effective, so to *customers* they were of equal quality. But from the *client's* perspective, the work of the veteran—completed on time, on budget, and without draining additional resources—was of much higher quality than the work of the inexperienced writer, which was a debacle.

Communicators

As technical communicators, our own views on quality matter, too. Much of what we do is invisible, or implicit, in that we are paid to avoid—or at least to root out—errors of omission and commission. Readers give no credit for lack of errors but are quick to complain if they spot any. (A 2019 study by Website Planet found that Web visitors are nearly twice as likely to bounce off a site if the first page they see has a spelling or grammatical error.) Our professional standards and ethics drive us away from negative quality attributes, such as errors and typos, and toward positive attributes, such as clarity, concision, and consistency, which lie entirely within the domain of writers, graphic artists, and editors, or sometimes one person assuming all of these roles. A roomful of reviewers can make something accurate, but rarely can they make it clear or concise. That's up to us.

Doing an excellent job is great, but can you repeat the results? An individual piece of technical communication can be unique to one release of one product. Take a step back, or look over time, and you recognize the similarities between document versions, documents of the same type for different products, and types of information. (This is the theory behind DITA.) Technical communication is, in many ways, a manufacturing process, so the principles of process quality apply. The hallmark of professionalism is consistency of results; even lone writers create style guides. Getting the job done right every time requires focusing energy on elements that differ, scheduling work realistically, and obtaining regular technical reviews. These are all elements of process quality that clients might not value, but we should. The best way for us to synthesize our processes is with checklists, which are themselves collections of quality attributes.

Taking the Measure of Quality

Product managers tell us that what can't be measured can't be managed. It's difficult to demonstrate, improve, or even maintain quality unless you can measure what you're doing.

It's hard to measure poorly defined attributes. Even a simple metric like errors per page requires common understanding of what constitutes an error and a page, as well as how to take the measurement. Do we measure the entire document or just a sample? Do we measure graphics? Other attributes are even more challenging: how do you measure clarity? Can there be too many illustrations, or too few?

With careful definitions, though, it's possible to define and use documentation quality metrics. This is the theory behind publication competitions. Measurement requires an agreed-upon formula, an understanding of the range and domain, and a protocol (how to measure). Effective metrics are repeatable and objective: the number you get today must be the same if you measure again tomorrow, and my measurement must match yours. Effective metrics can be collected and combined.

You can apply some metrics to finished products (for example, is the steak cooked medium rare?) and others during the production process (did the center reach 60°C/140°F?). To apply this classification to documentation, *evaluative* metrics assess the quality of a completed information product using customer-facing attributes, which enables quality control, while *predictive* metrics assess the quality of a draft information product using client-facing attributes, which enables quality assurance. It's impractical to ask technical communicators to spend a lot of time collecting predictive metrics while they're working, so the best metrics are both valuable and easily obtained (or well worth the effort to collect). Perhaps the most readily available, crudest, and fastest predictive tool is the automated readability checker in Microsoft Word. More thorough and nearly as fast is the ISO Schematron, which flags defects in XML document source files.

For assessing customer-facing documentation quality attributes, a checklist such as the one compiled in *Developing Quality Technical Information* (Carey et al. 2014) is an effective tool.

Client quality attributes—business metrics—lend themselves more readily to precise definition and measurement, so you will more often see the most important few process metrics on a dashboard. Dr. JoAnn Hackos's *Information Development: Managing Your Documentation Projects, Portfolio, and People* (2006) is a good source for client-facing attributes.

Collecting data is good; extracting information from data is better. *Composite* metrics, measuring two or more elements at once (such as words per topic, which is information), are better and more meaningful than *simple* metrics (such as word counts, which is data).

Considering All Perspectives

Within this framework, then, quality attributes come from three sources.

- What satisfies the **customer** is the most important part of the quality equation. They are the primary stakeholders, because if they don't buy what our clients are selling, our clients will go out of business.
- The next most important source of attributes (and the most fertile source of metrics) is process, the perspective from which our **clients** view our work. Clients are the secondary stakeholder, because if our clients don't like our work, *we'll* go out of business.
- The last part of the equation is the value that we as technical **communicators** add to our own work through style guides, checklists, and personal skill. When push comes to shove, we must accede to both customer demands and client standards.

Not all quality attributes are equally valued by all stakeholders. Every company claims its customers are paramount, but tension exists between the products and services a company offers and the money that they're willing (and able) to invest in manufacturing them. For example, topic reuse and sharing—the strength of DITA—reduce client costs by eliminating nearly identical blocks of text (software developers will recognize them as "clones"). But writers in DITA shops know that customers see text optimized for reuse as vague.

A professional informed by best practices can quickly and efficiently produce high-quality results. No customer has ever complained that a document was too well written or that its illustrations were too attractive! Yet there's also tension between our urge to craft and polish prose, which we know can always be clearer and more concise, and the schedule and budget constraints of our clients. From their perspective, it's possible for us to add *too much* quality by taking too long. Our job is fundamentally a compromise: To do the best we can with the time and resources at hand.

If you draw a Venn diagram (see Figure 1) grouping customer, client, and communicator quality attributes, I believe the customer circle will be the largest, and ours the smallest. There will be attributes that matter to each

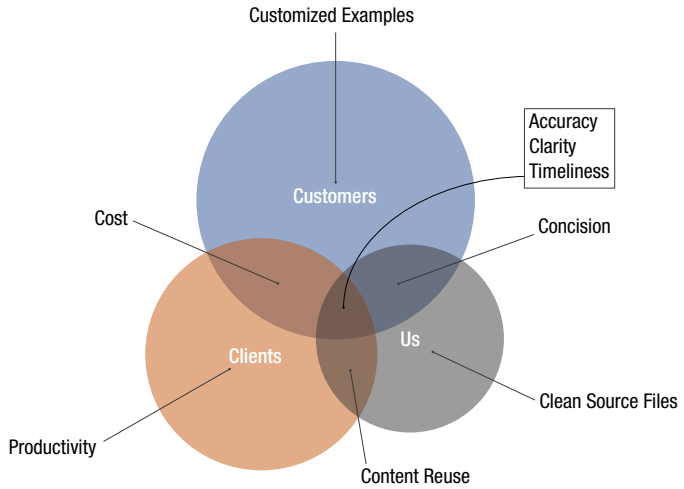

Figure 1. Common Attributes within the Quality Framework

stakeholder but not as much to the others, attributes that appeal to two stakeholder groups, and attributes valued by all three. I can't suggest how much the circles overlap, but the sweet spot will contain attributes that all stakeholders agree are important. We should focus on well-defined attributes that all stakeholders value, starting with accuracy. Where an attribute is valued by some, but not all, stakeholders, we should favor attributes valued by at least two of them. In that way, we can filter the universe of potential attributes into a manageable—and measurable—set.

This framework also gives us a test for evaluating new attributes. Do you have evidence that a potential attribute is valued by customers, clients, communicators, some combination thereof, or all stakeholders? The best new attributes are well defined, evidently valuable to all stakeholders, and easily measurable (or well worth the effort to measure).

Summary

The bottom line is that while no number of attributes can fully capture documentation quality, some attributes are more revealing than others. By adopting a framework of quality as important to customers, clients, and communicators—in that order—and by considering both product and process quality, we can classify quality attributes, determine which are most relevant and valuable, evaluate potential new ones, and focus on the most important ones—perhaps few enough to fit on a dashboard—without getting bogged down in details. i

STEVEN JONG (stevefjong@comcast.net) *has been a member of STC for more than 35 years. He contributed the "Musing on Metrics" column for the Quality SIG from 1996 to 2005. Steve is a Fellow and the recipient of the 2012 President's Award. He has served on the STC Board of Directors and the first Certification Commission, and he is in his third term as President of the New England Chapter.*

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Let Your Users Teach You: Document Quality and Usability Testing

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By LISA D. GAY

WE KNOW that understanding a document's audience affects countless decisions: structure, order, what to include (and what to exclude), tone, and so on. One way we can approach document quality is by asking, "How well does it meet users' needs?" To answer this, we are often limited to second-hand information about users from colleagues who interact directly with customers, such as those from product management, marketing, sales, support, and others.

However, your colleagues are immersed in your company's products full time. Tasks that were confusing when they first encountered the product are now part of their knowledge about how things should work. They might even forget that that they were ever confused. That's part of building product expertise.

But that also means that your main source of information about your audience has a lot of foundational knowledge that your audience does not. Inaccurate assumptions lead to documentation that doesn't align well with your readers' needs—a mark of poor quality.

As a technical writer who has partnered with user experience (UX) designers and learned about UX design practices through that collaboration, I have discovered that usability testing is one methodology from UX design that has helped me to improve document quality by giving me a new understanding of my audience.

Real User Knowledge Makes a Difference

The first time I documented a product while following UX design principles from the start, I was amazed at the difference. The documentation was easier to write, because the features were fully intuitive. The documentation was also easier to use. I could eliminate entire sections that explained counterintuitive concepts or described how to find settings in a series of haphazard dialog boxes.

But more importantly, I could write better documentation, because I had a better understanding of our customers. Until then, I *thought* I knew my audience. I had a notion of the kind of job they had, what problem our product solved for them, and the specialized terminology of their industry. From that, I determined their priorities, what product features were most important to them, where in the workflow they might struggle, and how they understood the role the product played in their day-to-day life.

One technique in particular, however, revealed that I was making many incorrect assumptions without even realizing it: usability testing. Watching real people use the product and its documentation gave me solid information I could use to create higher-quality documents.

What Is Usability Testing?

Usability testing is easiest to understand in the context of user-centered design (UCD), a product development process that focuses on identifying and understanding users' needs. Briefly, the UCD process involves learning about your users through interviews, creating an initial product design, testing the design on real users, and then using the results of those tests to iterate on the design until it's ready to hand off to developers for implementation.

Typically, usability testing comes into play when you test the product design on people who are similar to the expected end users for your product. A technical writer observing product usability testing can learn many things relevant to improving documentation, like context, workflows, and terminology.

If there isn't a UX team running product usability testing, a technical writer can run testing on the documentation directly. Ideally, you would have access to current users or sales prospects, a person available to do note taking, half a dozen colleagues from different departments to be observers and to help analyze the results, a couple of weeks to run five or six test sessions, and a development sprint to make improvements to the product itself.

Most of us don't have all of those resources available, but that doesn't mean usability testing isn't possible. You just need to make a few compromises.

Testing Document Usability

Let's take a look at what a formal documentation usability session looks like. In each session, a single test subject attempts to complete a small number of specific tasks with the product using the documentation to help them. Observers write down observations about the user's *actions* and *words*, not attributing any meaning to them. For example, the observation "Alice re-read the second sentence very slowly" is more useful than "Alice was confused."

Usability testing also requires a facilitator, someone who is familiar with the principles of usability testing and can keep the session on track. Skilled facilitators need to juggle a lot of functions. For example, they must:

- Keep the test subject at ease. "We're testing the documentation, not you. You can't do anything wrong."
- Encourage the test subject to talk about their thinking process out loud. "What did you expect to happen when you clicked that?" "What do you think that term means?"
- Resist the temptation to help the test subject when they get stuck. "If you didn't have any technical support available to you, what would you do to figure this out?" "Good question! What do *you* think that button does?"
- Think on their feet when the test subject says or does something completely unexpected. "Could you tell me more about why you went to that page of the help?"
- Ask follow-up questions after the subjects have completed the planned tasks. "What did you find most frustrating?" "What questions did the documentation not answer for you?" "If you could rename that button, what would you call it?"

Usually, the number of new observations tapers off after about five test subjects, at which point you can analyze the results to find what patterns emerge. A good analysis occurs in two phases, kept carefully separate.

- First, list the *observations*. It's important to not interpret them, yet, so that you can avoid leaping to conclusions shaped by your assumptions. Note whether each observation was unique to a single user or occurred in several sessions.
- Second, shift your attention to *interpretation*. Discuss what each behavior means and what you might want to do about it.

These results will help you to adjust the documentation so that you can test again with the next revision.

This summary only describes the basics. You can learn more about how to plan and carry out usability testing from the resources listed at the end of this article.

It's tempting to think that other testing methods can take the place of usability testing. When you complete a document, you probably test it against the product. If your organization's release process calls for it, a QA tester might validate the procedures you wrote. These approaches are helpful and can find some kinds of flaws, but usability testing has two key differences: you're observing, not participating; and the tester is someone who wasn't involved in building the product.

These two factors might seem simple, but they explain why usability testing can make such a big impact on product and document quality. Letting real users' behaviors guide documentation decisions is the most direct way I've found to create documents that meet my audience's needs.

Making Do with What You Have

The formal usability testing process might sound like more than you can manage, especially if you're strapped for resources. Or, you might have trouble getting permission to interact with customers or show a draft outside the company. You can take a lighter approach, drawing your pool of test subjects from your colleagues.

Reach out to people in different roles—product management, engineering, customer support, marketing, and sales all have useful perspectives. Most importantly, seek people who are not familiar with the product or, at the very least, haven't attempted the specific workflow you are testing. If you have trouble finding people willing to spend time on this, seek anyone who has voiced concerns

about users struggling with the product. Position yourself as their ally in improving the customer experience. And after testing, ask if they want to recommend any of their colleagues as test subjects or observers.

What You Might Learn

The initial intent of usability testing is to improve products. When my colleagues observe testing sessions (or are participants themselves), I often hear comments like the following.

> "I never realized how complicated that configuration process is!"

> "I thought everyone understood what 'key' meant in this context, but most of the users assumed a completely unrelated meaning."

> "I thought our users needed all of the report data to decide what to do. I'm surprised they didn't want to analyze all of those metrics. How can we simplify the report view?"

This can inspire product managers and others to push for design changes that make the product easier to use—and to document. But usability testing can also help technical writers with their work. Some gems you can mine immediately:

- Finding a better word to describe a difficult, abstract concept.
- Identifying the most confusing tasks so that you can prioritize your work efficiently.
- Learning a better way to organize content in the online help.

For example, I created a getting started guide for a cloud delivery network product. Many steps applied only if the user first enabled HTTPS delivery. I prefaced each of those steps with "For HTTPS sites only." One thing I wanted to learn from usability testing was whether that wording was clear. But the test subjects showed me that I was asking the wrong question: "I don't want to have to think about what protocol I'm using, over and over through the whole process. Why not have two versions of the guide? That way I can see only the steps I need to see." The next edition of that document had two versions: one for HTTP-only sites and one for sites with HTTPS delivery. For our users, a documentation experience that only asked them whether they used HTTPS once (when picking which process to follow) was better than a single, comprehensive process that covered both cases.

You can also get valuable insights about the context in which your users interact with your product. Consider the delicate balance of password requirements. At first glance, it might seem very secure to require passwords to contain at least 15 characters of four types and to force a password change every month. But usability testing would probably reveal that users won't even try to memorize a password that complex. They'll write it down somewhere, creating a security vulnerability.

All of this information can help writers improve document quality.

Conclusion

In my experiences with usability testing, one thing has become clear: there is no substitute for watching users interact with the product. It's hard to overstate the value of observing someone try to complete a task when they don't have background knowledge of the product or preconceived notions of what the workflow should be. It's also very hard to communicate what it's like to have a user show you an entirely new understanding of a feature unless you have had the experience yourself.

I encourage you to try usability testing on your own products and documents. If you have a UX design team available, team up with them. If not, plan a testing session with the resources you have available. The books in the resources section below can guide you. Steve Krug's book, *Don't Make Me Think Revised: A Common Sense Approach to Web and Mobile Usability,* has a good chapter about conducting fast, lightweight usability testing (see the chapter "Usability Testing on 10 Cents a Day"). His website has additional resources, including a sample script, tips for observers, and a video of a usability testing session. David Platt's book, *The Joy of UX: User Experience and Interaction Design for Developers,* provides more detailed instructions and is especially helpful for navigating the process in relation to software products. Don Norman's book, *The Design of Everyday Things,* is a foundational text in UX design, with more focus on physical objects than the other two.

Do some usability testing, and really get to know your users. Your documents will be better for it.

LISA GAY, M.A. (lisagay@alumni.uchicago.edu), *came to technical writing in 2006 from a background in the humanities. She has written in several fields, including smart grid technology, cloud delivery networks, and pharmaceuticals. Currently, she documents products at RightHand Robotics, Inc., a leading provider of piece-picking robots for supply-chain logistics. Known as a passionate advocate for users, she draws on user experience design principles to create effective, frictionless user assistance.*

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Can You Improve Quality with Open Source?

By BEN MANSHEIM

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IMAGINE YOU ARE sitting at your desk, three months into a new technical documentation job. The software that your company produces is highly technical and bleeding edge; it's created by geniuses and it's marketed to geniuses. Until you joined, the developers wrote the hundreds of pages of existing documentation to the best of their non-native English ability. You know that the documentation is not of the highest quality—not from your expertise, but because your main customer wrote their own administration guide for your software *from scratch* and sent it to your company for consideration as a replacement for the official documentation—and it seems technically good but not professional enough.

In this situation you might feel overwhelmed, underqualified, lost, hopeless, and ready to quit.

Just then, the product manager comes into your office and says, "I have an idea. If we assign a couple of pages to each technical person in the company for them to review, they can send you all of those hundreds of style and technical comments to process the changes, get approvals, and implement the changes." You think, "Do I get a last meal before this sentence is carried out?"

This story is not made up. In fact, it ended as a dream, not a nightmare. But how?

The Documentation Quality Challenge

We know that content is king, but if the content is filled with technical or writing style errors, then the king will quickly be dethroned. High-quality new content requires that the right information be delivered in the right way so that the reader understands it. These two criteria of technical accuracy and writing style are critical to success.

In the area of technical accuracy, subject matter experts (SMEs) tend to explain technical information in the way that is most comfortable for them. They might include technical terms that are unfamiliar to readers, details that are unnecessary for the task, and language styles that are not designed to be easily understood by most readers. The responsibility of the technical writer is to mitigate for these tendencies while staying true to the technical details required by the reader.

In the area of writing style, writers tend to focus more on the method of communication than the content that needs to be communicated. Writers might exclude necessary details, simplify terminology, or reconstruct content to match standard writing guidelines. While the writer has access to the source of the content and can revisit the writing style, SMEs are dependent on the writers to update content if there are any mistakes. This situation creates a delicate balancing act.

Traditional Document Change Management

In traditional documentation departments, the writers are not the owners of the information but they *are* the authority of content. The SMEs hold the knowledge and the writer needs to massage that knowledge into text so readers can understand it and accomplish their goals. The writer stores that text in a repository—that only the writer has access to—to prevent untracked changes from unauthorized writers. As a result, any changes to that text must be passed through the writer so the text can be published as official documentation.

In our story of mass document editing, the developers can write their comments in a Word document, in PDF comments, or via any other change-tracking method, then each change can be validated for style and accuracy before it is included in the official documentation. Not all of the comments will be complex, but those that are complex are most likely very important and require technical review from more than one SME. In addition, after the comment is approved, only the authorized writer can implement the change in the writing software. The writer has to get the approved version of the text after all of the revisions have been made and enter it into the software.

We know that content is king, but if the content is filled with technical or writing style errors, then the king will quickly be dethroned.

Traditional documentation methodologies cannot support the kinds of mass changes that the product manager in our story is asking for without high overhead and risk.

Open Source Document Change Management

Instead of using this traditional system, what if you could:

- Give everyone access to the source text with the ability to recommend changes directly in the source text;
- Manage discussion about the changes;
- Record approvals of the final changes;
- Merge the final changes into the official documentation at the press of a button; and
- Revert sets of related changes without risk to the rest of the content.

Wouldn't that be great? Well, when I was in the situation described in our story, we *did* all of these.

At its core, *open source* means that a product ships with the code that was written to produce it. The ability to access this source code creates the potential for modification and repackaging that is governed by a variety of open source licenses. It also can allow people to contribute modifications back into the core project, so that everyone benefits from those modifications. A robust version control system adds the security that any changes that are made can be

isolated for precise review and merged and unmerged without risking any other content in the system.

Whether your documentation is proprietary and needs to be kept under lock and key or it is non-proprietary and can be shared freely across the Internet, open source documentation allows many contributors to participate in the process of creating high-quality documentation.

Getting into the Open Source Details

Often the content source is kept away from the SMEs to protect the formatting of the content or to ensure that changes are controlled. Let's look at an example of how this open source process works to see how this situation is handled.

Often the content source is kept away from the SMEs to protect the formatting of the content or to ensure that changes are controlled.

In the company from the opening story, all of the content was written in Markdown format. There are many markup formats to choose from, but Markdown is a simple markup language that uses common symbols to designate the most used formatting elements. Most of the time, the formatting of a Markdown file is limited to line markers that indicate that a line is a heading, unordered list, or ordered list. These simple styles are processed commonly by a static site generator (SSG), such as Jekyll or Hugo, into HTML files. The static site generators convert the markers into specific numbers or indent levels based on pre-packaged rules and generate the required HTML accordingly. Because the formatting of the files is so basic, there is little risk that a change an SME makes will cause unexpected changes in the formatting of the output, and no proprietary editing software is required. In addition, many developers are familiar with markdown from their development experience.

To mitigate against the change management dangers of sharing source files, the company stored the source files in a GitHub repository. Again, there are many implementations of git source control, but GitHub is one of the most popular and familiar to developers. Anyone who wants to make a change to the source must copy the entire body of the source into a separate branch. Then they can make changes without impacting the authoritative version of the source files. During the course of editing, any set of changes is committed as a group, or *commit*, to the branch. When the editor is finished with the changes, the set of commits is proposed to be merged into the master copy of the source files as a *pull request*. Commonly, the editor or the owner of the repository invites experts to edit and approve the pull request. The set of changes can be discussed and edited until it is approved and merged into the master copy of the source files. In addition to the highly granular level of change tracking, any pull request or even individual commit can be reverted without impacting the rest of the source files.

With these strengths, the source files can be shared with many people and the changes can be managed with a high level of confidence that only approved changes have been merged into the source files.

Let the Wild Rumpus Begin!

To conclude our story, the product manager quickly assigned a few pages of the documentation to every employee in a technical role. The employees had a few days to review the content on those pages and to open pull requests to incorporate changes.

By the end of the review period, more than 40 pull requests were submitted for changes to the documentation. Most of the changes were simple spelling mistakes or other corrections that the reporters corrected themselves, and I had only to approve and merge. I sent the remaining pull requests to other resources for correction and approval. In just a few days, we made many technical and writing style corrections that significantly improved the quality of the documentation, and we did it by improving everyone's ability to contribute and without taxing any individual resources.

In this scenario, we applied the open source process to use internal company resources to improve the documentation. If the technical content in the documentation can be made publicly available, the same process can be used to encourage people outside of the company to contribute to improving the quality of the documentation.

Summary

Open source documentation principles encourage the content source to be maintained in formats and systems that allow public or private contribution to the documentation with a high level of certainty that the content will not be harmed by those contributions. For organizations that can consider implementing these principles, you can open your documentation to more contributions and leverage them to make high-quality documentation.

Resources

For more information about open source documentation principles and practices: *https://www.docslikecode.com/*

BEN MANSHEIM (ben@redislabs.com) *moved over 10 years ago from building networks to writing documentation about them and has never looked back. Currently he serves as the Documentation Specialist at Redis Labs and runs the Write the Docs meetup in the Tel Aviv area.*

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The Evolution of Quality

By ROCHELLE FISHER

OVER THE PAST 20 YEARS, the definition of "quality" has evolved. Let's take a look at what quality used to mean and what it means now.

Then

The year is 1999. I delivered my first F1 Help project. On my desk was a bug report: "Explanations for the OK and Cancel buttons are missing."

In a huff, I went to the QA engineer who wrote the report. I demanded in what I thought was a stern tone, but was probably more of a whine, "Why in the world do the users need to be told what OK and Cancel do?"

"You explained everything else," said the young man calmly. "It looks odd that those two are missing from every page."

My future-self guesses that the QA team probably had a quota of bugs to write, and this was filler. My then-self didn't know this was a thing. She thought back to 1997, to her teacher's words:

> "The goal of technical writing is *rapid information retrieval*. We accomplish that through writing according to the three Cs: Comprehensive, concise, and consistent."

As far as I knew, my writing was concise. It was consistent with my senior writer and with the style guide. If I added OK and Cancel, my document would be comprehensive.

Now

Today, I believe that the definition of quality has changed. There are different ways to define quality. Let's look at two: the ideal and the reality.

The Ideal

With the modern dispersion of technology, today no technical writer would waste time or space explaining OK or Cancel. In 2017, Jason Silva said, "A young kid in rural Africa with a smartphone has better communications technology than a head of state—than a president—had 25 years ago." Our users have more knowledge, and less patience, than they had 20 years ago. If we waste our space with knowledge that can be assumed, we lose their trust that we have something to offer them. When users see something similar to "Click OK to close the window" in the first procedure, many will decide that the complete document is too remedial and close it. They will look for their answers in Google or open support tickets. Our work is undone.

If we upgrade our ideals of quality documentation, we can fulfill the vision of helping our users with *rapid information retrieval*. We evolve our definition of quality to meet the evolved requirements of our users.

- Rather than *comprehensive*, aim for *relevant*.
- Take *concise and consistent* to a new level with *controlled*.
- Expand our goals to include accountability by definition and make *accurate* an explicit characteristic of quality results.

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Relevant

If the product is basically intuitive, you do not need comprehensive documentation for every possible way to open a window or change a light bulb. If you know your target audience well enough, you can create product deliverables that answer questions that users ask. These questions can be anything from "What can this product do for me?" to "How do I respond to this emergency?" to anything in between.

Relevant is not a replacement for comprehensive. Quality documentation explains every feature; it is comprehensive. It also takes into account how much we explain and in what order. A *comprehensive* document explains everything that the developers give us. A *relevant* document explains what the user needs to know. Relevant technical writing is delivered in a medium that is expected by the users. It might not be a document at all. It could be video tutorials, self-service articles, or chatbot answers.

Let's look at an example. In version 1.8 of a product, the admin guide mentions a new feature: Users are required to log in with Two Factor Authentication (2FA). We have all used 2FA, though not all of us know that name for it. It is when you are required to enter a code from a smartphone application, such as Google Authenticator, in a web user interface. In the 1.8 guide, the technical writer wrote more than 200 words about setting up 2FA with different vendors. Later, we realized that the admin who clicks **2FA Required** on the product does not set up the authenticator. All those words explained what 2FA is and how it works. There was nothing for the user to do. In version 2.0, we made the documentation relevant. We replaced the 200 words with, "Users will get the QR code and instructions on their next log in to the Console."

Be aware! If you give only instructions for what the user can do, your support engineers will complain. Users will open tickets to ask how something works, or what happens in the backend when an option is selected. You cannot make a hard-and-fast rule that your documentation will contain only what you think is relevant for the users *until you learn what your users think is relevant.*

Here are some tips that I use to write what is relevant.

- Use the product. If you write about using regular expressions (regex) in your product, be as knowledgeable in regex as your target audience. You will know what to document and how much. If you never use regex, you might end up hiding the relevant points in a mess of industry-standard knowledge.
- Build a relationship with your company's professional services group (sometimes called customer success or similar names—the team who works with users, after pre-sales and before customer support). If possible, shadow an on-site visit.
- Lurk in webinars and lectures. Make a note of questions that are asked, and make sure that the documentation answers them.
- Take free, online courses in the field of your target audience. Make sure you know the terms and concepts that are assumed knowledge.
- Search for "this means that" and "in other words" in your document. These are red flags that you might have wasted words explaining the technology to yourself.

Controlled

A *concise* document does not repeat information and does not use multiple words when one will do, but a document that conforms to a controlled language (CL) standard is, on average, 30% more concise than one written without a CL (Braster).

A *consistent* document might simply be consistent with a style guide, but a document written using a CL reaches a new level of consistency. The main purpose of a CL is to control the vocabulary. One word has one definition, and that definition is represented by that word only.

Even without a formal CL, you can control your language with a style guide, if it limits allowed grammatical forms and vocabulary.

Here is an example that offers *more with less* when the language is controlled.

5. In the last step of the wizard, click **Finish**.
6. When the install has been completed, restart the computer.

With a CL standard, this example becomes the following.

5. Click **Finish**. One hour is necessary to complete installation.
6. Restart the computer.

In this example, install is sometimes used as a noun and sometimes as a verb. This can cause confusion in longer sentences and for non-native English readers. The CL determines that install is a verb, and installation is a noun.

The original text tells the user when to start the action (when the last step of the wizard appears or when the installation is done), but the numbered steps indicate that the user should perform one action at a time. Why say, "When the previous action is done, do the next action," when you can give information that is meaningful? Do not use the vague "when." Tell how long the user must wait, or show the result, or remove that unnecessary text.

The best tip I can give for writing with a CL is to choose one ("Controlled Natural Language"), and then get professional training in how to use it.

Accurate

I've seen many advertisements for technical writing courses that promote technical writing as something that ex-pats can "easily do" in a non-English speaking country or as a good part-time job for retirees of any background.

I cringe when I see these. Technical writing is no longer (if it ever was) simply writing. A quality technical writer is a tech lover, a fast learner, and a person who holds himself or herself accountable for the final deliverable. We cannot rely on others to do the technical work for us. We must run CLI commands. We must write scripts that use the API we are documenting. We must be hands-on. We must ask the questions that the users ask. We must get the most accurate information possible.

Here are some tips that I use to write what is accurate.

- Help QA when possible. If your company has a bug bash event, join it.
- Learn the operating systems that your users use. For example, if you learn enough Linux, you will know to add the dot before the slash if your SME forgets it.

The Reality

Relevant, controlled, and accurate: these are the ideals to reach for. You can get training in a CL, learn your product line inside and out, and obtain an understanding of what the typical user needs. You can create quality deliverables given the time.

This brings us to the second definition of quality.

The reality of many companies is Agile sprints and frAgile releases. Quality is not an idea. It is a specific definition in the scope of a high-level work plan. Often, the definition of quality for documentation in this reality is, "it exists."

We have our benchmarks, our idea of the perfect deliverable. We constantly strive for relevant, controlled, accurate results. It is good that we do so, but given two weeks to create documentation for a new product, we must become project managers. We get the scope and determine the priorities. We make impact plans and schedules for stages of delivery. We produce what is required according to the project plan and the product owner's definition of *done*.

That is quality for *that* project. The definition of quality will change with the next sprint. Our ideal of quality guides us in our actual work, but it must never hinder us from fulfilling the definition of the project. We cannot let a release be late due to documentation. Sometimes, we must deliver a 100-word description of the product in concise, accurate language that is relevant for a specific vendor and that vendor's audience.

And those 100 words will be all that we are allowed to deliver. And we have to be okay with that.

ROCHELLE FISHER (rochellef@sentinelone.com) *is a documentation team manager. She began her career in technical communication in 1997. Rochelle loves Simplified Technical English (STE) and has trained newbies in it, though she insists that a team who is serious about writing better, faster, and cheaper get some professional CL training.*

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Conversations with Content Consumers

By ENID NEWBERG, FRAN SARDONE, LARA KULPA, PETER JOHNSON, and YOEL STRIMLING | *STC Senior Member*

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Guest Editor's Note: The following is a reworking of a number of email conversations that the authors had over the course of several months. I have rewritten these email exchanges (with the approval of the authors) into a "virtual conversation" to give them the feel of a coherent discussion. Thanks to Daniel Foster of TechSmith for introducing the authors to each other and to me.

Yoel: Technical communicators want to produce high-quality content that helps their readers do their jobs better, but they can't really do that if they don't know what their content consumers actually want. Most of the time, for various reasons, technical communicators only talk among themselves and don't hear their readers' voices.

So I had a brainwave. Wouldn't it be great if we could get some *actual* content consumers to write an article for *Intercom*? Rather than just have a discussion about what readers want among a group of technical communicators, how about we open the conversation up a bit, and include the readers themselves?

So I've invited the four of you, Enid, Fran, Lara, and Peter, to put on your "content consumer hats" and talk about how you define the idea of "content quality." Each of you will undoubtedly bring your own personal thoughts on what this means—and that is excellent, because quality is not "one size fits all."

I think this will be a good way to both showcase the diversity of what content consumers think about quality, as well as to focus it into something that technical communicators can use.

Peter: I would say that content quality is like a conversation. That is, it's an agreement between at least two people: the content creator and the content consumer or end-user. For this agreement to work, content creators need to know that content consumers approach their content with both implicit and explicit standards for what they want.

When I use content, I want it to both meet my expectations (I have different expectations from social media, a video, a newspaper article, a user guide, or a training session), as well as meet my requirements (no matter the type of content, I want it to be easy to understand, visually effective, and relevant to me).

Fran: For me, content quality means that every activity in the training session I'm in, or topic in the documentation I'm reading, must be appropriately contextualized to result in meaningful learner/reader engagement, typically organized around a clearly stated goal. If the activity is part of a course or document that incorporates several activities, then the goal must also link to appropriate and clearly stated outcomes in support of the subsequent activities.

As a content consumer, I sometimes find that there's a gap in the logical flow of content leading up to/following up from an activity. Somewhere you've made

an assumption that I will understand how and why this activity is meaningful. Even when an activity is introduced effectively, there is sometimes no meaningful integration with subsequent activities.

I typically see this as a symptom of either the content creator having only a superficial understanding of the content, or that they aren't really subject matter experts (SMEs). Or maybe they are SMEs, but they're so immersed in the content that they can't step out from it. The passion for the topic overshadows compassion for the learner or reader.

Lara: I feel like both of you have definitely touched on some of the biggest pain points.

In my mind, "writing for users means thinking like users." In other words, content has to flow tightly and logically from one idea to another based on how users use it.

As a content consumer, the one thing that frustrates me most is a lack of flow. In any kind of technical documentation, online or off, I want to follow up on anything I read with whatever question pops into my head at the time.

Some of the worst perpetrators of bad content flow are the biggest companies. I wish they'd talk with their customer service people. I wish they'd collate their live chat records and analyze them. I wish they'd give me what I'm looking for without me needing to click more than once or twice to get there.

I need to see that the content creator can anticipate my questions and provide me a direction to seek answers. Content flow needs to make sense and be intuitive.

Enid: Lara, you made a good point about the apparent disconnect between those who design a system, those who do the technical writing, and those who need help and use the content. Those who create technical documentation need to make sure that they get access to the customer service reports and buy-in for continued updating and improvement of the content.

Content quality is based on what content consumers think about the content, and getting access to customer feedback is a great way of anticipating what they want and how they are looking for it.

Yoel: Can you give some examples of either positive or negative experiences that you yourselves have had with content quality?

Enid: A couple of years back, I spent two to three hours with our local telecom company, because their online help had articles that no longer matched anything in their current offerings.

Between phone calls with technical support people who could help with the single instance but didn't know why it wasn't working as described, and sending long written commentary about the remarkable number of bad links, bad information, and circular references, I was finally able to get a very simple answer about how to consistently change the forwarding number for the office when not in the office.

Peter: I just finished an outstanding online course. I think that the attributes that made the course so good apply to all types of technical communication.

First of all, complicated activities and topics were presented in a way that made them easy to understand. For example, each time a new term was presented, a clear definition was given and repeated later.

The materials were broken up into short sections that were easy to process, and each section used practical examples with which I could identify. Several of the key concepts presented were things that were relevant to me and I could apply to my work right away.

Not only that, but each section was presented in a consistent manner, with a specific pattern. First the explanatory video with examples, followed by a summary of two to three key ideas presented in the video, and finally the challenges. Each section averaged about 30-45 minutes, which was just the right amount of time.

Fran: I had the opposite experience.

There were too many caveats and warnings about what not to do before I engaged with the activity itself (was the content creator afraid that I'd get the activity wrong?). How many tip boxes or callouts are required for me to review? Did they run out of time in creating this content? I got the impression that their successful teaching/instruction was prioritized over my learning.

Lara: A very well-known domain registrar and hosting company offers an extensive documentation and FAQ area on their website. Domain registration and Web hosting, however, while technically related, don't usually have the same types of issues. When I went to this company's help section and typed in "managing DNS records," the first page of results showed me 3,901 results! (No, I'm not exaggerating, that's what it said at the top of the page—is this Google? Nope. It's the company's site.)

After the first three entries ("Manage DNS zone files," "Manage DNS in cPanel hosting," and "Manage DNS templates"), which were still not quite what I was looking for, I kept scrolling.

"Manage DNS for your hosting account" (okay, that might be it).

"Manage Secondary DNS" (wait, maybe that's it?).

"Manage DNS zone files for your domain registered at another company" (oh no ... that's what I wanted! I think?).

It doesn't make sense. It's not intuitive. And it frustrates the heck out of me.

And then, let's say I actually find the page with the help that I need from within the current setup that they have. The "related articles" section has five items that could actually be related, and three that aren't *at all*. Like, at all.

There's also a "You may also like..." section, with additional "helpful" articles. It's all over the place.

There's literally nothing helpful here that doesn't confuse people in the process.

Yoel: What advice would you give technical communicators about how to provide you with high-quality content? What do you want them to know?

Lara: I would suggest that the best thing to do is use an online documentation platform to maintain a tagging and/or keyword system, and offer bookmarked links to related or possibly related next steps.

You've got to have an intuitive and cohesive system that can work with the customer to anticipate what they need. And maybe, just maybe, if someone clicks too many things that don't make sense, put them into a live chat, or tell them to write out their question and someone will get back to them ASAP—and then get them real help that way.

Enid: I would say that it's very important to make sure that your content is reviewed by someone else, preferably a reader, but if that's not possible, by an editor or another technical communicator who can act as a sort of "reader advocate."

I have always believed that it takes a minimum of two people to get one brain, particularly in the technical world. Content creators can outline what they want to see from quality content, but without having a fresh eye to review the documentation, it will always fall short. When you prepare technical documentation, you already know the product, so you become blind to portions of the beginner's mind and make assumptions that might not be valid.

Peter: When you start creating content, be it documentation or a training program, remember the following:

- Start with clear objectives—who are you writing for and what are you writing about.
- Use outlines and drafts to keep the entire project in perspective.
- Collaborate and communicate with team members, as well as potential clients or end-users.
- Use models of excellence whenever possible, including examples of quality work from respected developers, as well as developing templates that can prevent you from rebuilding everything from scratch.

Like I said at the beginning, quality is a conversation, and like any good conversation, there has to be clear communication both ways. For training sessions, this could be done using student assessments. How well did a group of students learn the material or skill presented? For documentation, this could be done using client surveys. For example, at the bottom of a customer support page, you could ask readers if they found the content helpful.

Fran: Begin with the end in mind. Ask yourself:

- What are the goals or outcomes that your project is working toward? Spell them out so that there is accountability for assessment.
- Stay on point and recognize when digressions and additional and supplementary information require separate treatment.

I would also say that content creators need to test the quality of their content with an objective reader/user, and pay attention to their suggestions. When it doesn't make sense to your user, it doesn't make sense—full stop.

Also, when activities are integrated into the content design, provide an introduction describing how the activity or interactivity will be experienced by the content consumer. Please don't surprise us.

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STATEMENT OF OWNERSHIP, MANAGEMENT, AND CIRCULATION

INTERCOM (ISSN 0164-6206) is published eight times a year by the Society for Technical Communication, a nonprofit educational organization, as a service to the membership Members may pay $60 for a print subscription to INTERCOM.

The mailing address of both the publication and the publisher is 3251 Old Lee Highway, Suite 406, Fairfax VA 22030. The publisher is the Society for Technical Communication, and the editor is Andrea Ames. The owner of the publication is the Society for Technical Communication.

There were **499** copies of INTERCOM published in **October 2019**. The average for the preceding 12 months was **527**. The paid/requested outside-county mail subscriptions for the **October 2019** issue were **451**; the average for the preceding 12 months was **429**. Total distribution for **October 2019** was **459**. The average for the preceding 12 months was **470.** Eight (**8**) free copies of INTERCOM were distributed by mail in **October 2019** and the average number of free copies distributed during the preceding 12 months was **30**. Forty (**40**) copies of INTERCOM were not distributed in **October 2019**, and the average number of copies not distributed during the preceding 12 months was **60**. The percent paid/requested circulation in **October 2019** was **98** percent; for the preceding 12 months, percent paid/requested circulation was **94** percent.

The *2018–2019 Salary Database* Is Now Available for Download and Purchase

THE *2018–2019 SALARY DATABASE* is now available for download. All 2019 members receive a free copy in their membership confirmation email of the *Salary Database* PDF, which includes charts, maps, and an evaluation by an economist, as well as the Excel Workbook. Nonmembers may purchase the publication for $149. Visit *www.stc.org/salary-database/* for full details.

The STC *Salary Database* is a tool that can be used to conduct more powerful job searches, make a strong case for a raise, or prepare department payroll budgets. The data in the *Salary Database* are drawn from the United States Bureau of Labor Statistics' (BLS) Occupational Employment Statistics (OES), the main resource of human resource departments across the United States.

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- **A global technical communicator** looking for rates to charge or pay for a project or consultant in the United States
- **Any technical communicator** in need of either annual or hourly wage information

This year's data offers new insights into how the economy has and will continue to influence the demand for technical writers. In 2017, employment rates for technical communicators increased modestly, and 2017 now represents the highest employment level for the occupation since being individually tracked by the Bureau of Labor Statistics. "Technical writer" as a profession has seen employment growth every year since 2011, with an average annual employment increase of 1.9%. Globalization and export markets continue to be important to the U.S. economy, showing an increase in 2017 in translators and interpreters. The *Database* also highlights the largest and fastest-growing industries and geographic areas in terms of both wage growth and job growth.

2019 members receive the Excel Workbook for free, which can be used to format, analyze, and manipulate the data easily. Visit *https://www.stc.org/salary-database/* for more information on the *Salary Database.*

2020 Election Preliminary Slate

THE STC NOMINATING Committee (composed of members Jackie Damrau, MaryKay Grueneberg, Kelly Schrank, Li-At Rathbun, and chair Jane Wilson) is pleased to announce the preliminary slate of candidates for the 2020 Society election:

President

Craig Baehr will automatically succeed from the office of Vice President

Vice President

- Kirsty Taylor

Secretary

- Timothy Esposito
- Rick Lippincott

Director (two positions to be elected)

- David Caruso
- Todd DeLuca
- Ann Marie Queeney
- Jamye Sagan

Nominating Committee

(two positions to be elected)

- Tonie Flores
- Liz Herman
- Christina Mayr
- Roger Renteria

Congratulations to the candidates, and thanks to all STC members who expressed interest in running for office.

Note that the preliminary slate was prepared in accordance with the *current Society bylaws.* Individuals who meet the qualifications for Society office and engaged the nomination process, but were not selected for the slate, may choose to pursue nomination by petition of 5 percent of the voting members of the total membership as of 31 August of the calendar year preceding the election (see Article VIII, Section 2, Part D). Individuals who seek nomination by petition must submit the required materials to the Society office by 13 December 2019. The final slate for the 2020 election will include candidates appearing on the preliminary slate as well as any qualified individuals who are properly nominated by petition and approved by the Board of Directors.

The Society election is scheduled to open on 24 February and close on 9 March 2020. To be eligible to vote, members must have paid their dues by 31 January 2020.

Technical Editors as Advocates

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BY MICHELLE CORBIN | *STC Associate Fellow*

IN MY PROFESSIONAL blog back in 2011, I declared technical editors to be arbiters of quality when I outlined my definition of technical editing. In an article in *Intercom* from 2012, my co-authors and I asserted that technical editors are advocates for the customer (user), the company (our organization), and the product itself. In one of my "Editing Matters" columns last year, I declared technical editors to be quality champions. In this column, I focus on my previous assertion about our role as quality advocates by addressing how the different types of edits that we do (comprehensive editing, usability editing, and copy editing) are like performing different types of quality assurance testing for each of our stakeholders (see Resources).

To perform these different types of edit, and by extension the different types of quality assurance, we need to know how our company and team defines quality. Each team that you work with will have their own take on quality attributes. At IBM, we use the nine quality characteristics outlined in *Developing Quality Technical Information* (task orientation, accuracy, completeness, clarity, concreteness, style, organization, retrievability, and visual effectiveness). Yoel Strimling includes an exhaustive list of definitions of quality in his *Technical Communication* article on what documentation quality means to readers (see Resources), and while few definitions include all nine, at least one of the nine characteristics is included in each definition.

Advocates for the Company

Most people likely consider technical editors to be advocates for the company they work for, by completing *copy edits* to ensure branding, naming, trademarks, and other legal issues do not arise in the product information. Additionally, these copy edits advocate for the company by improving the clarity and translatability of the information, reducing costs of translation, and ultimately reducing support costs due to incomplete or unclear information. While this is a critical type of editing that technical editors complete for the team, it cannot be the only type of editing completed.

Advocates for the Product

The documentation, in all its forms (embedded, online, printed, and so on), is part of the product, and as such, it must contribute to the overall usability of the product. Even in today's agile, iterative development environments, technical writers and technical editors still must advocate for the documentation to be done alongside the product. One type of editing that technical editors can complete is a *usability edit*. Often, usability editing is just merged in with comprehensive editing, but I think it deserves to be called out on its own.

Technical editors certainly ensure that content is accurate and clear, but they must also make sure that it is usable. They test the information and verify that users will succeed by finding gaps, errors, or ambiguities in the information. Technical editors verify the navigation to ensure the information can be found, but they also try to verify the steps in the information, to ensure they can be easily followed (or if there is a usability issue in the product itself).

In Editing Matters, Michelle Corbin covers matters (topics) about editing that matter (are of consequence) to communicators of all kinds. Watch this space to understand more about editing and what you can do to improve the quality of your content. To suggest a topic or ask a question, contact Michelle at *michelle.l.corbin @gmail.com*.

Advocates for the User

While technical editors do advocate for the company by completing copy edits, and they advocate for the product by completing usability edits, technical editors ultimately advocate most for the users by completing comprehensive editing on the information. In a *comprehensive edit*, technical editors ensure the technical accuracy of the information, reduce the amount of information to only what is truly needed, organize (or reorganize) the information to help the user find and use it easily, and decide the best way to apply style and word usage, all based upon a detailed understanding of the users. (You cannot advocate for the user if you do not fully understand them!)

Technical Editing Is a Quality Assurance Process

In this special issue about content quality, it seems appropriate that most of my references are to articles written about technical editing as a quality assurance process. It all comes back to that statement: Technical editing is a quality assurance process. You might define quality differently over time—either by characteristic or by stakeholder—but technical editors will always be the ones that help you verify that you've delivered high-quality information.

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Ethical Questions: When Users Can't Tell You What They Want

BY AMANDA KRAUSS | *Guest Columnist*

IN A 2018 Interaction Design Association talk, Fiona McAndrew made a challenging observation: "For the products we design, we cannot rely on consumers to accurately describe their ethical and privacy needs."

This may not be a welcome thought for those of us who make our living talking to users; after all, isn't the lion's share of our job to find out what users really want? We assume that if we use the right interview and usability testing techniques, we will get to the bottom of our users' needs, wants, and desires.

McAndrew is right, however, and her point is easily demonstrated with other research. She cites, for example, Mozilla's 2017 survey, titled "How Connected Are You," showing that the more tech savvy a person is, the more he or she is concerned about the loss of privacy. The implication is that those who don't actually build technology—that is, the majority of users—do not have the base knowledge or mental models needed to understand the current digital landscape, let alone to tell us what they need in scenarios they don't know they're encountering.

In a similar vein, Digital Content Next runs consumer research asking users what kind of treatment they expect from organizations like Facebook and Google. Consumers regularly report that they do not expect their behavior to be tracked across the Web, despite this being a well-established and documented practice. In her *New York Times* editorial, techno-sociologist Zeynep Tufekci wonders if there is such a thing as informed consent in the modern age. In Tufekci's view, multi-page, jargon-filled privacy policies, combined with the fact that these policies are attached to software that many people *must* use in their jobs, mean that being informed, let alone choosing to consent, is not a realistic option for consumers:

"Given this confusing and rapidly changing state of affairs about what the data may reveal and how it may be used, consent to ongoing and extensive data collection can be neither fully informed nor truly consensual—especially since it is practically irrevocable."

The overall problem, then, is that people engaging with the products we design do not have the mental models to inform their expectations; much of what affects their broad Web experience happens so far behind the scenes that it is invisible. Finally, while consumers may not be able to describe their needs, a recent Pew study shows that they do have a decreasing feeling of trust for digital institutions. All of this is to say that consumers may not know exactly how to describe what kinds of privacy protections they want, but they do know that they want something better.

What ethical frameworks can we use to address this problem?

McAndrew's observation places a heavy burden on those who participate in making Web content or products. She further notes that, when it comes to designing ethically, there is not yet an easy set of established patterns we can follow, nor a simple checklist that will solve our problems. It is at this point, then, that people participating in any sort of design decision need to think about the ethical framework they should use.

The article I recommend to my UX colleagues is "Using Ethics in Web Design," by Morten Rand-Hendrickson. Rand-Hendricksen, a practiced Web developer and designer, combines a realistic picture of Web development processes with an admirably thorough job exploring and explaining the four main branches of traditional Western ethics. Importantly, he encourages his audience to make ethical decisions by asking questions from several different branches, rather than seeing the world through a single lens.

The Greater Good

As Rand-Hendricksen notes, the typical framework used in industry settings is broadly utilitarian and requires that a decision maker weigh potential harms against the "greater good" in the results. The framework is popular in part because it is relatively easy to understand; one might frame it simplistically as a type of "pros and cons" list. In my experience, weighing harms and goods also appeals to the more mathematically-minded stakeholder: If I want to talk about potential harms, for example, I can do so using reassuringly concrete metrics such as NPS (net promoter score) or CSAT (customer satisfaction).

This framework, however, has limits. As Rand-Hendricksen and others have acknowledged, "the greater good" immediately discounts the experience of numerical

This column features ethics scenarios and issues that may affect technical communicators in the many aspects of their jobs. If you have a possible solution to a scenario, your own case, or feedback in general, please contact column editor Russell Willerton at *russell.willerton@gmail.com.*

minorities. The most obvious failing here is the need for Web accessibility standards: If the majority of a website's users are not disabled, does that mean we can ignore accessibility requirements? Most designers I know would answer with a resounding "no." In a similar vein, groups who are underrepresented in tech settings, such as women and people of color, may *seem* like a minority to those developing products; thus, their viewpoint is often excluded when considering who might benefit or suffer from design decisions.

Furthermore, in business contexts, the "greater good" does not reflect the needs of a single group; often, the calculations include what is good for the business, rather than simply focusing on what is good for users. Too often the good of the users is pitted against (for example) the bottom line: In this scenario, as design researcher Erika Hall notes in her thoughtful post for Mule Design, your design is only as ethical as your business model allows it to be.

Other Approaches

To combat the utilitarian habits we've fallen into, Rand-Hendricksen proposes a "four-pier" approach to ethical choices and starts with questions based on non-utilitarian frameworks. For this column, I'll focus on a few questions that are most pertinent:

- What kind of world are you building for your end user?
- What kind of person do you become in the process?
- Are you upholding your duties of care?

These are excellent questions to ask around privacy and ethics, as they require us to turn attention to ourselves, both as ethical beings and as actors whose work affects others. Do we want to build a world in which our users aren't fully aware of what they're agreeing to? Are we upholding our duty of care when we assume that users have the same technological knowledge that we do? If we ignore the fact that, for example, people never read long privacy policies, what does that mean about our own personal role in design choices?

Recommendations

When defining "the greater good," examine your own team's composition, and be sure to include people who have different experiences than yourself. As McAndrew suggests, this should include both individuals representing user problems, as well as subject matter experts who can weigh in on the potential harms of a feature that an individual product team might not see.

Accept the human in human behavior. One of McAndrew's key points is that people will often sacrifice privacy for convenience—but that doesn't mean that we should treat this action as a simple choice or as evidence of what the consumer genuinely wants. If we use a framework considering "duty of care," that includes recognizing the complexity of the technological landscape, as well as our users' place in it.

Experiment with different frameworks by asking questions. Questions are a great tool for ethical thinking. In my experience, the pitfall of a traditional classroom-style ethics approach is that it requires laborious explanations. First you must outline the base ideas for each stakeholder, then you must ask them to apply a newly-learned abstract framework immediately, without time for reflection. Starting with questions speeds discussion, and if anyone does ask about theoretical underpinnings, then you can proceed with more traditional explanations and educational resources.

Understand your own values. While asking what sort of person you become may seem like an introspective exercise in a business environment, it's really the key to all other decision making. Ethics thought leaders such as Samvith Srinivas have noted the importance of identifying your own purpose and values before starting to think about your company's values. In many cases, you will not have a lot of time to deliberate before your company expects you to act. It is important to understand your own values and ethics before you have to apply them.

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Just Because the Spelling Is OK Doesn't Mean It's Quality Content

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BY ALAN J. PORTER

THE DICTIONARY DEFINES the word quality as "the standard of something as measured against other things of a similar kind; the degree of excellence of something." But what does that mean in terms of content? This question made me ask, "Do we, as a profession, measure our degree of excellence?"

I recently ran a quick poll using my Twitter account (*@TheContentPool*) asking what other content professionals think of when they hear the phrase "content quality." The answers were along the lines that I expected, in that they were focused on the mechanics of producing good content.

The responses covered points such as:

- Grammatically correct
- No typos
- Consistent
- Preferred wording
- Unambiguous
- Enriched for search and discoverability
- Follows the organization's style and voice
- Enriched with links when references are made
- Has an explicit audience
- Has measurable goals
- Suitable for use in multiple contexts.

These are all great points and definitely things that we should all be thinking about as professional communicators. From a content convergence perspective, they are also goals that we should be encouraging other content producers across the organization to strive for, as well. We can help improve the quality of the content that our enterprises produce by leading by example.

That doesn't necessarily mean that we need to hold, and lead, classes on writing skills (although that can often be useful). What we *can* do is reach across functional boundaries to other content creators to ensure that we are all using the same words to mean the same things. Ideally we should have, or develop, a common vocabulary and taxonomy that can be used across the organization.

When we think about producing quality content from a holistic viewpoint, we should be aware, and make others aware, that the content could be used in different contexts and needs to be created with that in mind.

Creating content—no matter how polished it might be—just for the sake of creating content (as often happens with content produced in an organizational vacuum) is a waste of time and resources. I refer to this as "so what" content. It may be well written, but if it serves no purpose, and the reaction after consuming it is "so what," then it isn't a quality experience.

One of the respondents to my Twitter survey asked, "What does it (content quality) mean to you, Alan?"

For me, it means that content has the purpose I alluded to earlier. As some of the survey respondents suggested, good content should be written for the audience who will consume it, and have measurable goals. But I believe to be truly high-quality content, the measurable goals shouldn't just be internal ones (like click rates) but also those focused on helping the customer succeed. Did the content we produced deliver value to the customer? Did it help them with what they needed to do, answer a question, carry out a task, complete a transaction?

We can produce all the content we like that is grammatically correct, spelled correctly, lacking typos, and so on, but it's no good getting the mechanics of content production right if we don't help those who use our content.

What does "content quality" mean to me? It means delivering value.

As pre-sales content and post-sales content begin to overlap, Alan Porter provides the latest insights about our role in that evolution in Convergence Conversations. Learn through this column to build bridges and form synergies with your counterparts in marketing. Contact Alan at *ajp@4jsgroup.com* to ask a question or propose a topic for him to cover in this column.

Designing Content for Health-Related Processes

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KIRK ST.AMANT | *STC Fellow*

HEALTH AND MEDICAL content frequently covers processes for maintaining or treating one's health. Generating this content involves health and medical subject matter experts (SMEs) providing procedural information that technical communicators develop into deliverables for different audiences. The usability of that content involves more than how well it is written. It includes how effectively individuals can perform a process based on their backgrounds and where the related activity occurs.

We usually use our own experiences to guide the instructions we create for others, and that is a problem. Providing someone with instructions about how to drive from point A to point B, for example, is generally based on how we have driven that route vs. how our audience might approach this situation. As such, we might overlook key factors like how the time of day can affect how easily you can get from point to point during a trip. Such assumptions can affect the success with which an audience performs a process.

Similar factors can affect health and medical instructions designed to maintain or restore one's health. SMEs could provide excellent information for performing a process based on their experiences, yet these experiences could vary from those of the intended audience. These differences could affect how an audience uses those materials to perform an activity. Knowing what causes these issues can help technical communicators collaborate with SMEs to create instructional health and medical content that an audience can use more effectively. Achieving this goal often involves addressing three central factors:

- Comprehensibility
- Manageability
- Sustainability

Comprehensibility

First, technical communicators need to determine how well audience members understand what they are being asked to do. This involves determining if the individual has prior knowledge of the topic or prior experience performing a particular process. These factors affect how much information and what kind of information to collect from SMEs

This column provides information on trends, practices, and resources for applying technical communication skills in health and medical settings. Contact the columnist, Kirk St.Amant, at *kirk.stamant@gmail.com.*

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when creating materials to meet audience needs.

Comprehensibility also involves how information is delivered to help individuals understand the dynamics of a process. This can entail selecting a particular media format for sharing information to enhance comprehension. In some cases, the use of visuals or video might be a better method for presenting a process, because text alone or static images do not effectively convey concepts to certain audiences. Knowing what media format is needed can help technical communicators determine the information they need to collect from SMEs to create certain content.

Manageability

Next, technical communicators must determine the kind of information individuals need to perform a process. Engaging in an activity might require certain conditions. For example, instructions stating, "First, use a blood pressure cuff and stethoscope to check your blood pressure" assume individuals know how to use these devices. If they do not, the related information is of little use, for individuals cannot perform part of the process. Alternatively, individuals might know how to perform the process but not have access to essential materials for doing so—for example, they might not have access to the stethoscope needed to check blood pressure. Again, the ability to perform the process is not manageable, for certain materials are not available.

Technical communicators need to determine these factors before producing content. They can use this knowledge when working with SMEs to document procedures. Doing so could help identify when to add certain information—as in the previous example, knowing when to provide instructions on how to use a blood pressure cuff to check one's blood pressure. It could also include creating alternative procedures to achieve a health or medical objective, such as alternative approaches to performing a task like checking blood pressure if the audience does not have access to certain materials.

Sustainability

Sustainability involves how often and for how long an audience is expected to undertake an activity. The central question is, "Can an audience perform a given task repeatedly over time, or only once and under certain conditions?" Individuals might not be able to perform an activity as often or as regularly as an SME expects. This can affect the processes that individuals need to perform to achieve a health-related objective.

Treating an infection, for example, might be a process that SMEs associate with taking a relatively low dose of antibiotics repeatedly over time. If individuals cannot access antibiotics on a regular basis, however, the alternative might be to take a large dose of antibiotics at one time. By knowing what these sustainability dynamics are, technical communicators can work with SMEs to create content that addresses the realities of the audience.

Final Thoughts

Certain factors can affect how well individuals use instructional content to perform health-related processes. By understanding these factors, technical communicators can work with SMEs to create effective health and medical content for different audiences. Addressing aspects of comprehensibility, manageability, and sustainability can guide such activities and help technical communicators achieve this objective.

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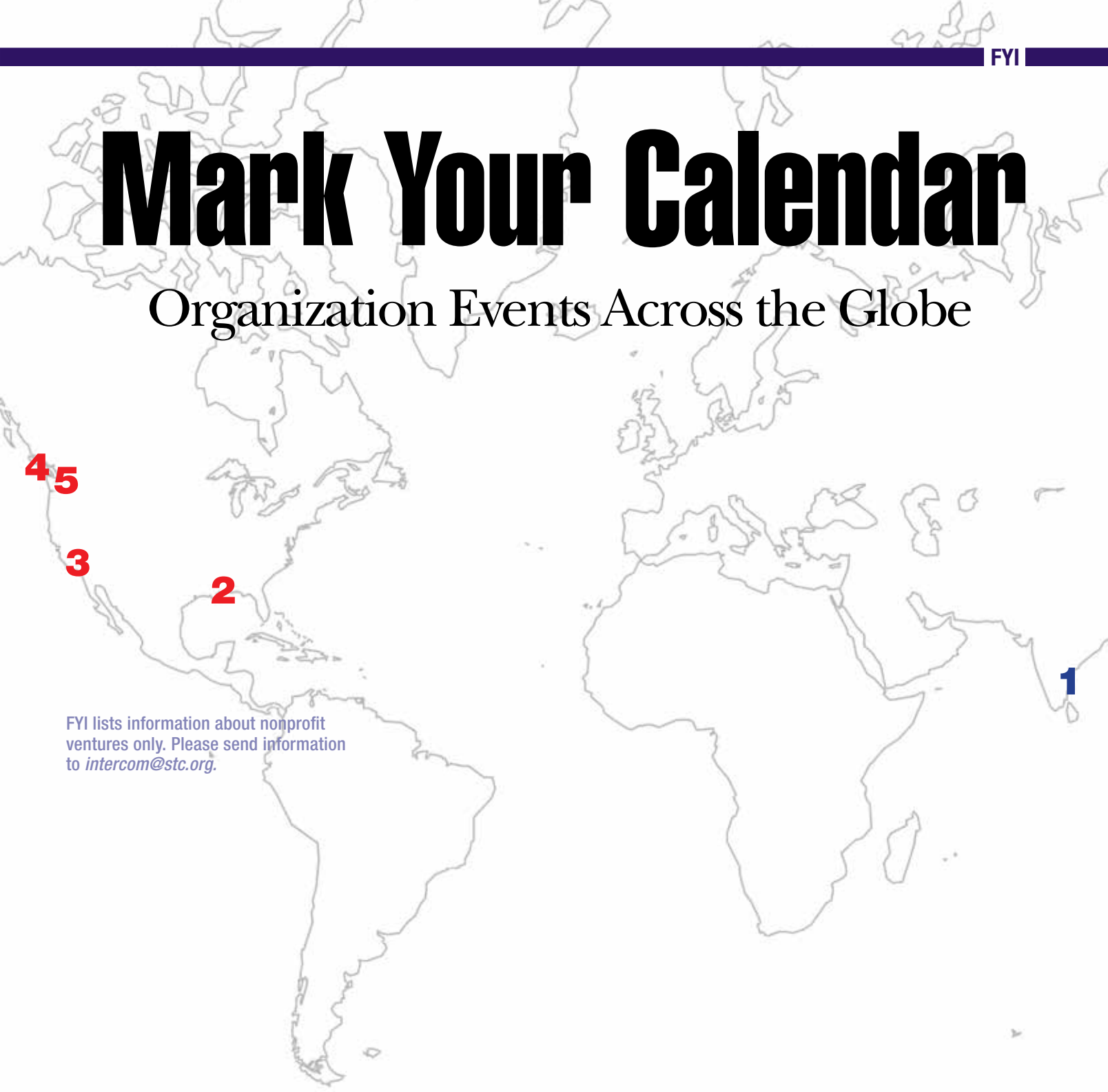
Organization Events Across the Globe



FYI lists information about nonprofit ventures only. Please send information to *intercom@stc.org.*

1 5–7 Dec 2019
The **India Chapter of STC** will hold its 21st Annual Conference in Chennai, India. For more information, contact STC India.
STC
https://stc-india.org/conferences/2019/

2 2-5 Jan 2020
The 94th Annual meeting of the **Linguistic Society of America** will take place 2-5 January 2020 at the Hilton New Orleans Riverside in New Orleans, LA.
LSA
https://www.linguisticsociety.org/event/lsa-2020-annual-meeting

3 27-30 Jan 2020
The annual **Reliability and Maintainability Symposium (RAMS)** will be held at the Marriott Renaissance in Palm Springs, CA.
RAMS
http://rams.org/
rams2020@rams.org

4 13-16 Feb 2020
The **American Association for the Advancement of Science (AAAS)** annual meeting will be held at the Washington State Convention Center in Seattle, WA.
https://meetings.aaas.org/
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5 15-18 May 2020
The 67th annual **STC Technical Communication Summit & Expo** will take place 15-18 May 2020 at the Hyatt Regency Bellevue, WA.
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Having a Healthy Holiday Plan

BY SHAWNEDA CROUT | *Student Member*

FALL BRINGS BOOTS, warm and snugly sweaters, pumpkin everything, conference season, and the excitement of looking forward to the holidays. For authors like me, October is the time to decide if you're going to participate in NaNoWrimo (national novel writing month) or find another way to feed your appetite for words over the holidays. Another decision I make is how I'm going to approach the endless parade of food and drinks from the end of October until New Years Day.

Planning where and who I'll be celebrating with has become an end of August habit that's helped me avoid returning to my heaviest weight at 299 lbs in 2011. By the end of September, a conversation with family and friends has helped me begin to decide where to spend Thanksgiving, who is hosting Christmas, and will we be together for New Years' Eve. Having a limit on the number of gatherings I attend, as well as who I'm spending time with, helps me know how to prepare.

Mom's Mimosas

A Healthy Lunch

When I'm with my health-conscious friends or family, I know I can contribute a healthy dish to the party that will be well received. If an invitation to enjoy time with a less health-focused friend is part of the itinerary, I make sure to have a salad before I go and bring my own calorie-free drinks to their event. No matter who I decide to spend time celebrating with over the holiday season, having a plan and knowing the host is key to being able to avoid the anxiety and guilt of overeating.

Putting together a feasible workout plan is also important for the holiday season. Whether strolling in the neighborhood or using one of my indoor walking DVDs, adjusting my workouts for being out late or not home helps alleviate the "how did I miss two weeks working out" confusion that used to happen every holiday season. Considering new workout plans and reading more articles about health and fitness plans for the New Year also helps me remember to stay committed to my healthy lifestyle.

Another part—and possibly the most important part—of having a healthy writing holiday plan is to remember that it is the holiday season. Will the world end if I gain a pound or two? No. In most, if not all, cultures, bonding over fellowship centered around food is the norm. When I plan to visit the friend famous for her peach cobbler, I give myself permission to enjoy a reasonable small portion. I don't take any containers for leftovers, and any of my own desserts shared are provided in disposable cookware to be left for someone else to take home.

Having a very introverted personality and isolated profession makes the holiday's a special time to socialize each year. Being able to enjoy the time with others while honoring my commitment to living a healthy, writing life used to be very frustrating. Since implementing this plan a few years ago, battling the holiday bulge at the beginning of the year has become a distant memory.

SHAWNEDA CROUT *is a technical communicator and author. Her work is fueled by hot tea and good music. She'd love to connect on LinkedIn. To find out more about her, visit* www.shawneda.com.

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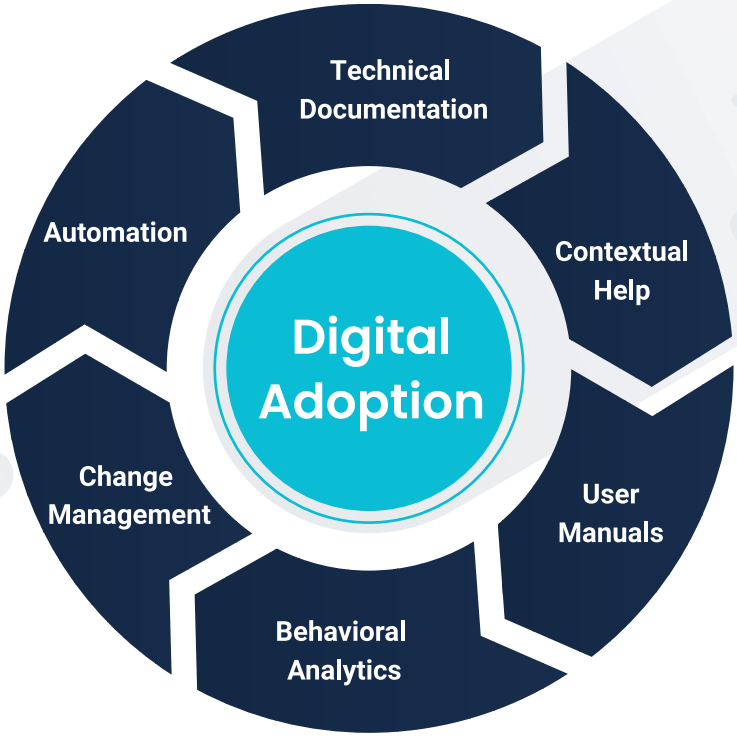

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